Intelligent Choice

STEP 4 · PROCURE

Request for Proposal

A tender-ready brief to quote and build the proven solution.

Prepared for

James Hartley

Meridian Property Management
October 2026

CLIENT CONFIDENTIALITY & ANONYMISATION

This sample document is based on a real client engagement. The organisation and individual names have been changed to protect client confidentiality. The document is published with the client's permission for illustrative purposes.

Intelligent Choice treats client confidentiality and the responsible handling of business information as fundamental to our work.

SECTION 01

About This Brief

This Request for Proposal (Builder Brief) invites quotes to build Phase 1 of automated maintenance coordination for Meridian Property Management. It is written to be self-contained: a builder should be able to price and plan from it without needing the earlier engagement documents, although the Solution Blueprint and Proof of Concept Report are provided on request.

Intelligent Choice acts as the client's independent architect. We designed and proved the approach, we will help assess responses, and we do not build or resell the solution, so our advice carries no stake in who wins.

> **The brief in one line: automate trade dispatch, follow-up, escalation and logging over SMS, with PropertyMe as the system of record, and no new app for trades.**

SECTION 02

Context and Constraints

One person currently coordinates every maintenance job by hand, using a spreadsheet and her personal phone. MaintenanceManager failed because it asked small trade businesses to adopt a new platform. The design therefore has hard constraints that any proposal must respect.

- **SMS only for trades.** No app, no portal, no login.
- **PropertyMe remains the system of record.** Every status change is written back to the job record.
- **A person always has the last word.** Anything the system is unsure about goes to a property manager.
- **No silent failures.** Every job reaches an owner or a flag.

SECTION 03

Scope

In scope (Phase 1)	Out of scope
Job pickup from PropertyMe, classification and urgency scoring	Replacing or customising PropertyMe
Trade dispatch by SMS with follow-up and escalation	A trade app or tenant portal
Plain-text reply reading with human fallback	Automated AI intake of tenant requests (Phase 2)
Landlord and tenant status updates, with drafts for review	Production data migration beyond the preparation items below
Shared live job board and weekly summary	Payments, invoicing and compliance tracking

PREPARED BY THE CLIENT BEFORE THE BUILD

- Coordination spreadsheets migrated to a cloud environment.
- Business SMS number and platform account in place.
- After-hours contractor list centralised and complete.
- Landlord approval thresholds captured.

SECTION 04

Requirements

Priorities: **Must** is required for acceptance. **Should** is expected unless a good reason is given. **Could** is optional.

ID	Requirement	Priority
R1	Detect new jobs in PropertyMe within two minutes	Must
R2	Classify category and urgency, applying the response windows in the Blueprint	Must
R3	Check the landlord's approval threshold before dispatching non-urgent jobs	Must
R4	Dispatch by SMS to the correct trade, with pooled dispatch for critical and after-hours jobs	Must
R5	Follow up and escalate to the next trade when windows pass without a reply	Must
R6	Read free-text trade replies and flag low-confidence replies for a person	Must
R7	Write every status change back to PropertyMe within one minute	Must

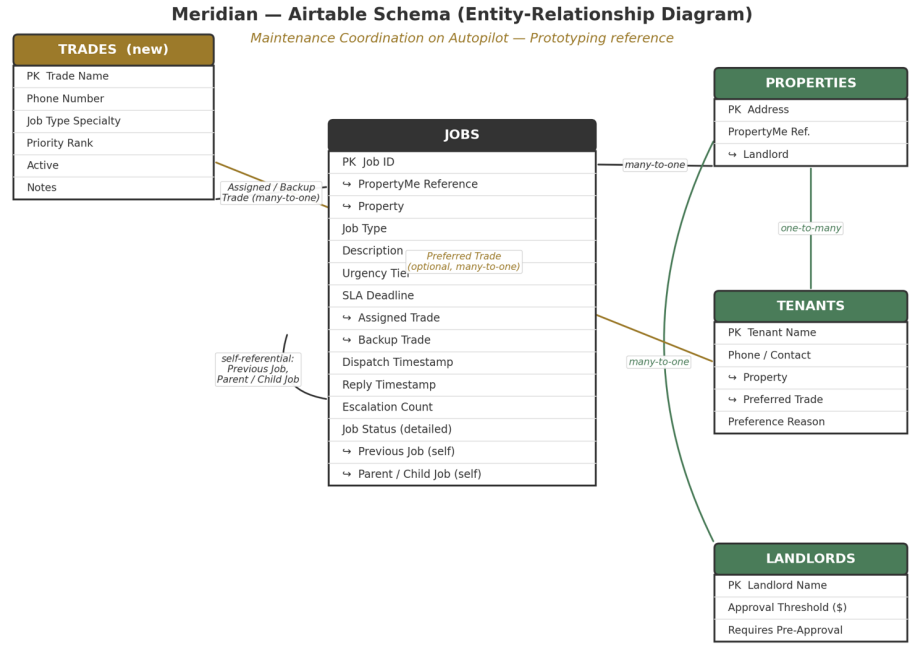
ID	Requirement	Priority
R8	Guarantee a job is never dispatched twice (unique dispatch key)	Must
R9	Retry, then flag, when the language model or workflow engine fails; alert Sarah	Must
R10	Log every message with delivery receipts, throttled and honouring opt-outs	Must
R11	Draft landlord updates for review before sending	Should
R12	Shared live job board showing finer job states	Should
R13	Repeat-issue flag within a 7-day window (length to be confirmed with Sarah)	Should

SECTION 05

Reference Design

The proven prototype used the stack below. Builders may propose equivalents provided every constraint and requirement is met and the reasons are stated.

Layer	Prototype choice
Workflow orchestration	n8n
Data layer	Airtable (five tables)
Language model	Claude API
SMS	Mobile Message, dedicated business number
Email drafts	Email API for review before sending
System of record	PropertyMe, via its jobs API



PK = Primary key ↪ = Linked record (foreign key)

Trades table is entirely new — this data does not exist in structured form anywhere today. Job Status now carries the detail Section 6 identified as missing (see notes).

SECTION 06

Acceptance Criteria

Acceptance is tested against the same evidence used in the proof of concept, so the standard is known before work starts.

Test	Standard	Method
Routing agreement	90% or better	Replay of the 40 supplied past jobs, compared with Sarah's decisions
Jobs without intervention	85% or better	Acceptance run on live jobs, length agreed with the builder, with an intervention log
Silent failures	None	Every job traced to an owner or a flag
Write-back time	95% within one minute	Timestamps on platform records
Failure handling	All defined paths pass	Model, workflow and SMS failures simulated
Trade experience	SMS only	No trade asked to install or log in to anything

SECTION 07

Commercial and Delivery Expectations

- A fixed price is preferred, with milestones tied to the acceptance tests.
- The client owns the workflows, configuration and data. Handover documentation is included.
- State where data is stored and processed. Australian hosting is preferred where practicable.
- Include a support period and a named contact after go-live.
- Show any assumptions that would change the price.

SECTION 08

How to Respond

Responses should cover the items below. Dates are set when the brief is issued.

Include in your response	Why
Approach to each constraint and Must requirement	Shows the constraints are understood
How you would handle failures and ambiguous replies	The main risk found in the proof of concept
Relevant experience with SMS workflows or platform integrations	Evidence of delivery
Plan and milestones tied to acceptance tests	Makes progress measurable
Price and assumptions	Lets responses be compared fairly

HOW RESPONSES WILL BE ASSESSED

Criterion	Weight
Fit to constraints and requirements	30%
Approach to integration and failure handling	25%
Relevant experience	15%
Delivery plan and milestones	15%
Price and commercial terms	15%

Process: questions are answered in writing and shared with all bidders, responses are submitted, a clarification session follows, and shortlisted builders demonstrate their approach before the client decides. Intelligent Choice supports the evaluation and the client makes the decision.



Travis Shaw
Founder, Intelligent Choice
travis@intelligentchoice.digital
intelligentchoice.digital